Chapter 3: Registering Patrons

4) Merging Patron Accounts

Often, after a library migrates to Evergreen Indiana, they will find that many of their patrons have duplicate records in the patron database with different borrowing privileges. Library staff should create a Patron Record Merge Request if the Patron Accounts have matching patron information and appear to be the same individual but have different borrowing privileges.

NOTE: If a patron already has a reciprocal borrower, student or computer user patron profile at another Evergreen Indiana library but they live in your library district, you can simply follow the instructions in the Evergreen Indiana Circulation Procedures and assign the patron a new library card, home library and user or group profile. There is no need to create a new account and merge the two.

After assessing whether or not the accounts should be merged, download the Merging Patron Form and fill in the information for each patron. If one or more of the accounts are not at the same library, both (or all) member libraries must consent to the merging of the records. It is the library's responsibility to get authorization for the merge and enter the information on the excel spreadsheet.

Instructions for completing the Patron Record Merge Request

Column A, B, and C list the barcodes that will be merged (deleted) into the resulting barcode. The final surviving barcode should be listed in Column D. **The resulting barcode should never be listed in any column other than Column D.**